



Avalara

GoTab + Avalara

July 2025

Safe harbor

For a compliant presentation

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Avalara

> Who is Avalara?

Avalara was created to alleviate the burden of tax compliance

KEY FACTS AND FIGURES



In operation since **2004**



More than **51 million** documents/certificates managed by Avalara in 2024



More than **1,200** signed partner integrations



55 billion AvaTax API calls were made by customers in 2023



More than **6.6 million** returns processed by Avalara in 2024



Serving **43K+** customers from **75+** countries



































GLOBAL PRESENCE



15
offices

5,300+
employees

Avalara supports tax compliance for 41K+ customers globally

RETAIL AND ECOMMERCE	MARKETPLACES	LODGING AND HOSPITALITY	MANUFACTURING	BEVERAGE ALCOHOL	SOFTWARE
 Black Diamond	GOAT	Aimbridge	 adidas	HERITAGE. DISTILLING CO.	 snowflake
CONVERSE 	 Hewlett Packard Enterprise	BOYD®	 Backcountry	 JIM BEAM	 FLOSPORTS
CROCS™	MakerPlace <small>by Michaels</small>	DREAMTRIPS™	BIRKENSTOCK®	 Leinenkugel's	 smartsheet
 K'ARCHER	 net32	expedia group™	 BREITLING 1884	 O'Neill — VINTNER & DISTILLERS —	 sugarcrm
MiiR	 POSHMARK	 HIGHGATE	 FOX FACTORY	 OPUS ONE	ORACLE® NETSUITE
<i>Reitmans</i>	Reverb	 JLL	 NORTHERN TOOL + EQUIPMENT	 Pinterest	
 SLEEP OUTFITTERS	 TPT	 SAGE <small>HOSPITALITY GROUP</small>	ring	 UBISOFT	
tréskin	yelp 	 Sonder	THULE® <small>SHOCKEN</small>	SILVER OAK	 upland
 YAKIMA	ZOLA 	REDFIN	 OXBO	 SINGHA	 Zillow®

The Avalara partner ecosystem

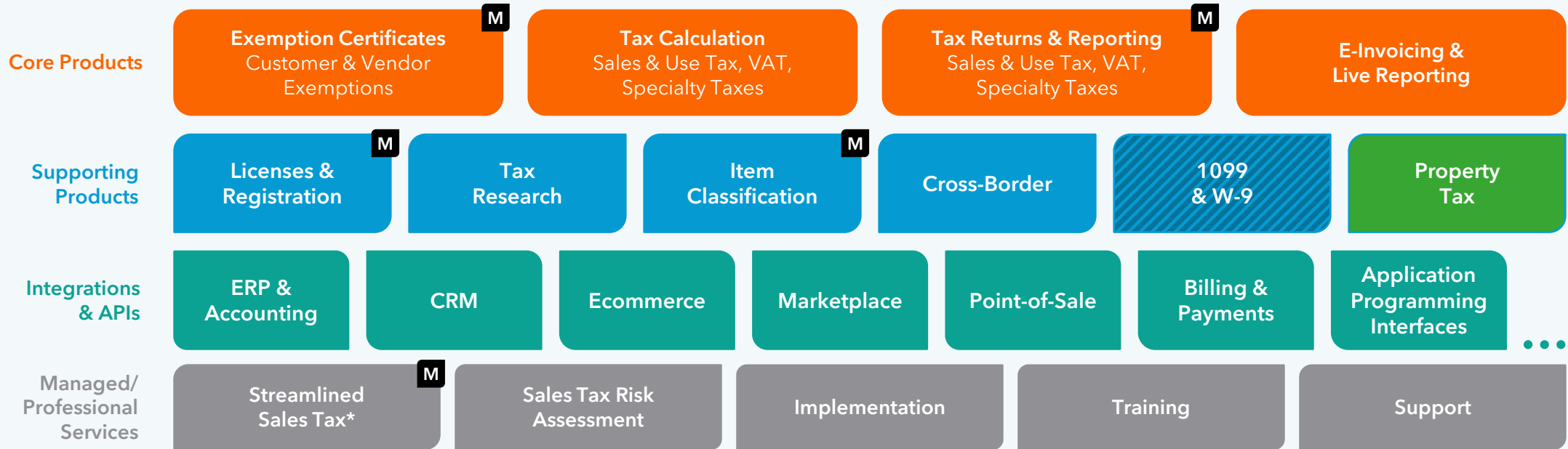
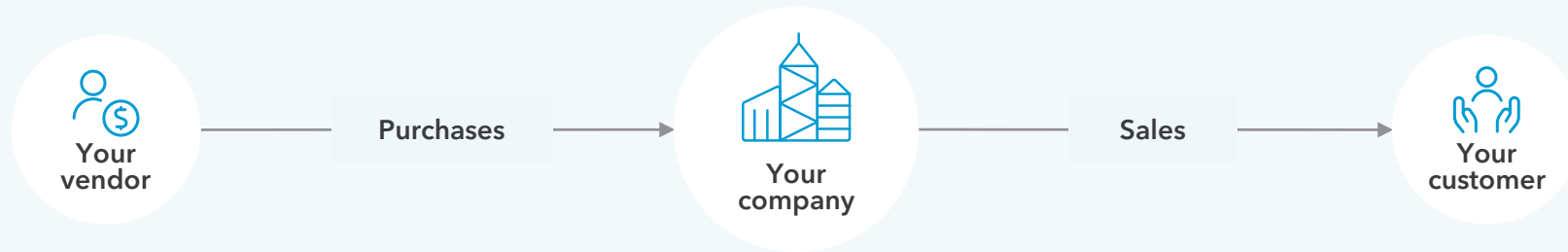
1,200+

Signed partner integrations

Comprehensive system coverage and partner relationships with a consistent tax policy that covers all channels where customers require compliance



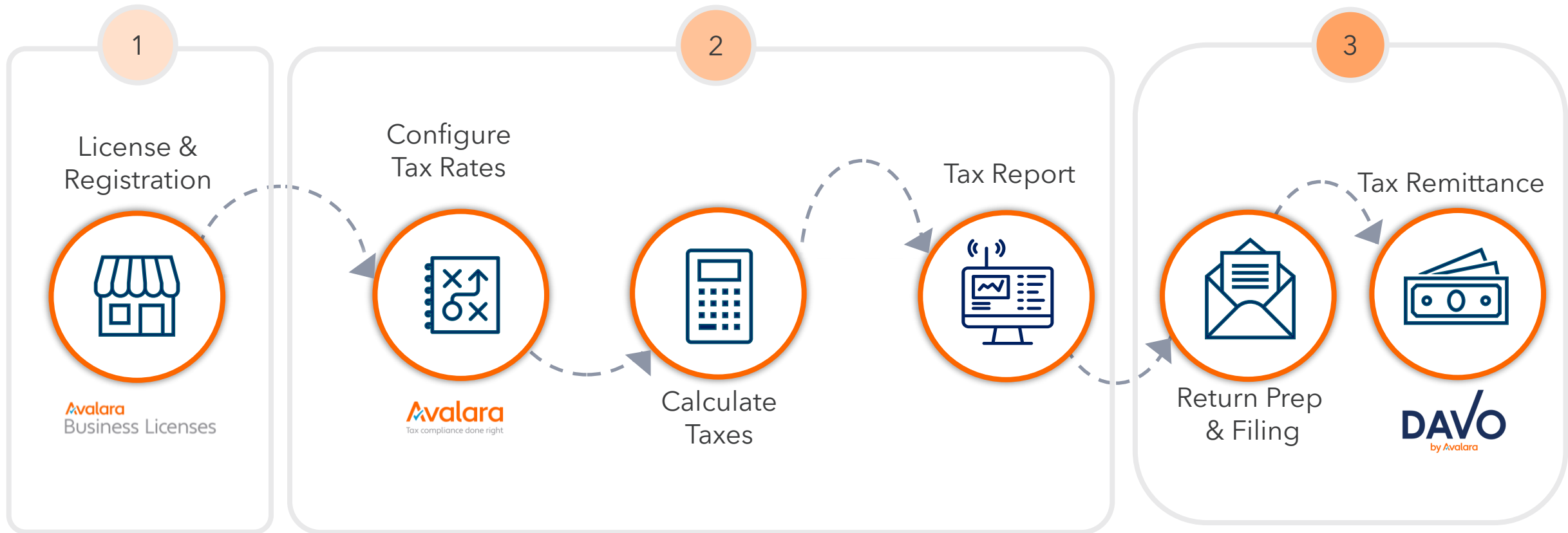
Avalara products and services



^M Managed services (optional)

*Certified Service Provider

Typical Business Tax and Compliance Journey



- Avalara Services for POS & Integration Paths

Avalara Services for POS & Integration Paths

DAVO returns

- DAVO builds to GoTab's API to pull data from GoTab to file and remit sales tax for GoTab customers
- This can be structured as a referral path where DAVO handles billing ("sell-through" arrangement) or we can sell to GoTab and GoTab can handle the billing ("sell-to" arrangement)

Business Licenses

- We have APIs, iframes, or you can refer

1099s and W-9s

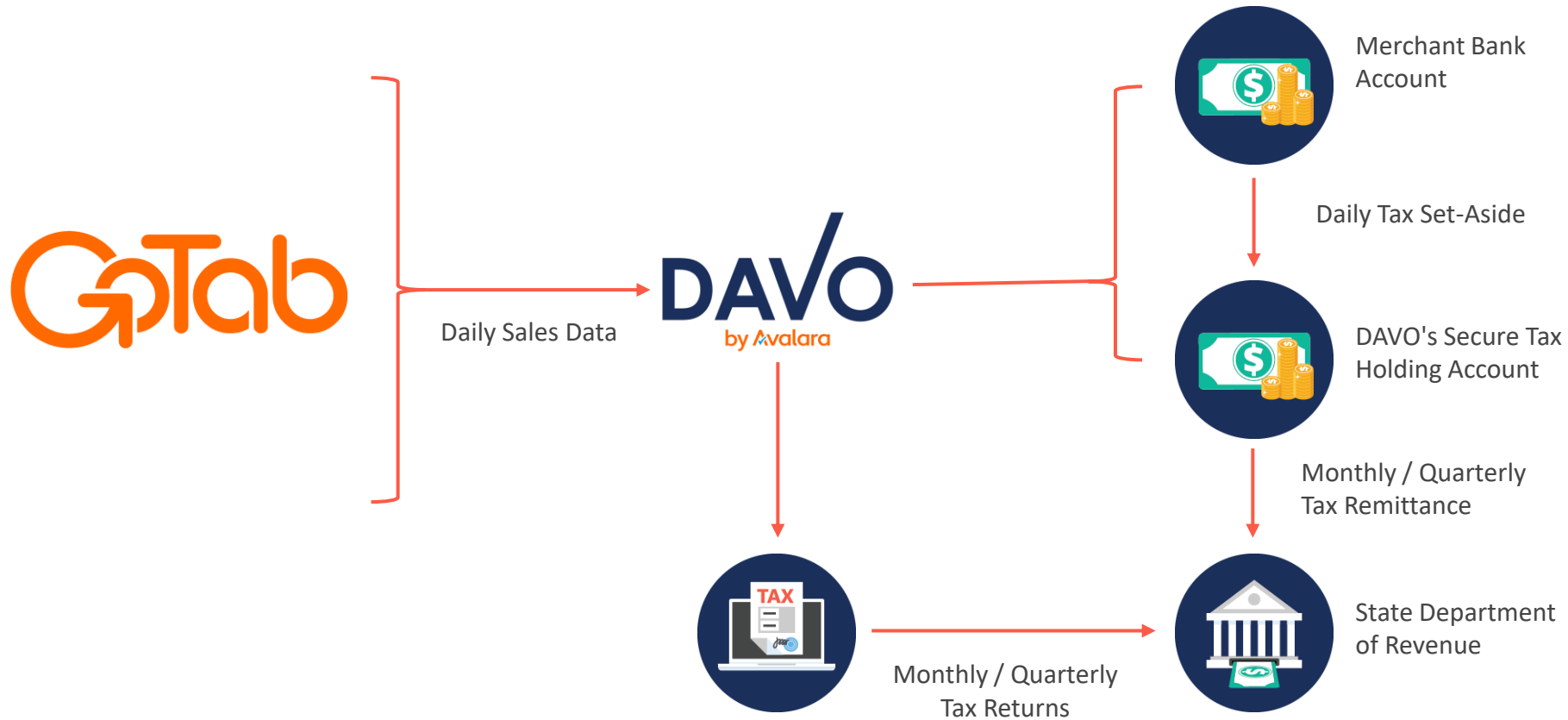
- We have APIs or you can refer

> DAVO Returns


Who should be using DAVO?

Restaurants	Retailers	Service
Quickserve	Liquor Stores	Automotive
Fine Dining	Clothing	Salons
Fast Casual	Gift Shops	Spas
Ice Cream	Toy & Hobby	Fitness
Coffee	Discount	Dental
Bakery	Florists	Veterinary
Pizza	Pet Stores	
Breweries	Sporting Goods	
Pubs		

How DAVO by Avalara automates sales tax



DAVO Merchant Dashboard




DASHBOARD
FILINGS
SETTINGS

Johnny's Restaurant

October 2021

\$91,475.53
Net Sales

\$7,666.10
Sales Tax



Date	Sales	Sales Tax	Set Aside	Status
Oct 31, 2021	\$3,732.68	\$312.86	\$312.86	Posted
Oct 30, 2021	\$4,328.43	\$362.89	\$362.89	Posted
Oct 29, 2021	\$2,937.56	\$246.20	\$246.20	Posted
Oct 28, 2021	\$1,918.18	\$160.83	\$160.83	Posted
Oct 27, 2021	\$0.00	\$0.00	\$0.00	--


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[EXPORT TRANSACTIONS](#)

Current Tax Filing Period
Jan 1, 2022 - Mar 31, 2022


Next Filing Date
Apr 20, 2022

Connection Status
Credentials to be verified



Do you love DAVO?
Now you can earn a \$50 Amazon gift card when you refer a friend and they sign up for DAVO.

[REFER A FRIEND](#)

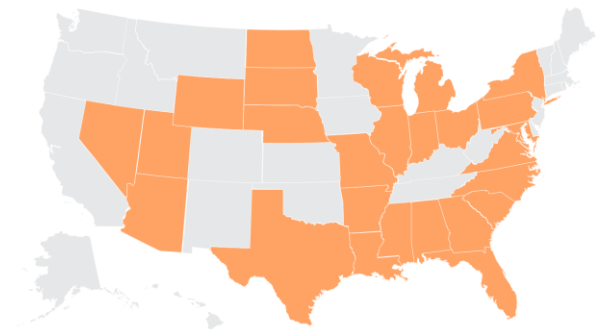


On-time filing discounts available in 27 states

State	Percentage Discount	Discount on \$3,500 of Sales Tax	Minus \$58 Cost of DAVO
AL	5% on First \$100 Tax Due; 2% on Balance	\$73	\$15
AZ	.0672% of Tax Due	\$23.52	(\$34.48)
AR	2% of Tax Due	\$70	\$12
CO	3.33% of Tax Due	\$116	\$58
FL	2.5% of 1st \$1,200	\$30	(\$28)
GA	3% of 1st \$3,000; 0.5% on Balance	\$92.60	\$35
IL	1.75% on Tax Due	\$61.25	\$3.25
IN	0.73% Under \$60,000	\$25.55	(\$32)
KY	1.75% 1st \$1,000; 1.5% remaining amount; Max refund is \$50	\$30	(\$28)
LA	1.1% of Tax Due	\$38.50	(\$20)
MD	1.2% of 1st \$6,000	\$42	(\$16)
MI	~0.6667% \$6/Month up to \$1,200	\$21.33	(\$37)
MS	2% up to \$50/Return	\$50	(\$8)
MO	2% of Tax Due	\$70	\$12
NE	2.5% up to \$75/Month	\$75	\$17
NV	0.25% of Total	\$8.75	(\$49)
NY	5% up to \$200 Qtrly or Annually	\$175	\$117
ND	1.5% up to \$110/Return	\$52.50	(\$5.50)
OH	0.75% of Tax Due	\$26.25	(\$31.75)
PA	1% on Total Due	\$35	(\$23)
SC	3% of Tax Due < \$100, 2% of Tax due > \$100 up to \$3,000/yr	\$133	\$75
SD	1.75% up to \$70/Filing	\$61.25	\$3
TX	0.5% on the Total	\$17.50	(\$40.50)
UT	1.31% on Total	\$45.85	(\$42.15)
VA	1.6% on Total	\$56	(\$2)
WI	0.5% Max \$1,000	\$17.50	(\$40.50)
WY	1.95% to \$6,250 Then 1% to \$500	\$68.25	\$10

DAVO returns on-time filing state refunds to business owners where available, often covering the subscription cost.

27 States offer on-time filing discounts
Making DAVO by Avalara Free or Discounted



DAVO Sales Tax vs manual management

Better use of resources

- Less expensive
- Zero hours spent

Fully automated end-to-end

- Accurate
- Efficient

Reduced risk

- Guaranteed on-time payments
- Clean books and records

Restaurants	DAVO Sales Tax	Manual Management
Cost Per Month	\$57.99	\$80 - \$300+
Your Time Per Month	0 Hours	1 - 6 Hours
Daily Cash Management	✓	✗
First Month Free	✓	✗
Guaranteed On-Time Payments	✓	✗
Daily Sales Tax Emails	✓	✗
Payment Confirmations	✓	✗
Online Sales Portal (OSP)	✓	✗
Document Storage	✓	✗

> Business Licensing

How to Help Your Customers that are Expanding or Relocating?

Avalara License Guidance (“ALG”) Report helps your customers know what licenses are required to operate

The screenshot displays the 'License & Permits dashboard' with a 'Business license report' section. The report lists licenses for New York State, including State Sales Tax Permit, State Alcohol License, and State Food Establishment Permit. Each license entry includes the authority, applicable businesses, and a 'License Details' button. A navigation bar at the top shows 1 Federal, 5 State, 1 County, and 3 Local licenses.

How do merchants know which Licenses they need to operate their businesses?

- Avalara will ask a basic series of questions about location and business activity, then immediately provide your customers with all licenses required at every level
- Avalara provides your customers with access to the authorities that govern each body of licensing, reducing the customers' need to research
- Easy to iFrame the License Guidance Report directly into your UI, enhancing customer engagement within your platform

How to Help Your Customers that are Expanding or Relocating?

Avalara License Filing (“ALF”) helps your customers renew their licenses on an ongoing basis

How does License Filing help your customers?

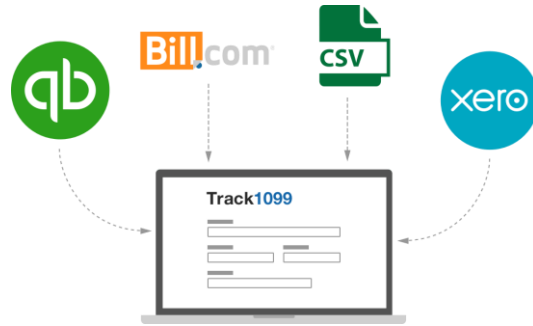
- Enables experts to prepare and file License applications directly with the authorities
- Recurrent revenue platform starting in 1H 2025, enhancing LTV
- Your customer simply fills out an online questionnaire and we will handle all license applications
- Track status of registrations via API

The screenshot displays the Avalara Registration Questionnaire interface. At the top left is the Avalara logo. The page title is "Registration Questionnaire" with a sub-header "Order # 882-46606 Form Prep Order for State(s): CA, FL" and a "Help" icon. A progress bar indicates "Your progress (49% completed)". A vertical progress indicator on the left shows the following steps: Welcome (100%), Business Activity (100%), Locations to Register (49%), Business Information (10%), Location Information (30%), Owner/Officer Information (Individuals) (0%), and Sign and Submit (0%). The main content area is titled "Locations to Register" and includes instructions: "Enter the physical address for the 2 business locations being registered. The address provided **cannot** be a PO Box / UPS Store / Mail Only address." and "Service businesses without a physical location (contractors, etc.) should provide the city, state and zip code of operations. Operating from a home office is a physical location." Below this, there are input fields for "Location 1": Country (United States), Address (317 S Broadway), City (Los Angeles), State (California), and Postal Code (90013). A "County - Optional" field is set to Los Angeles. A green checkmark indicates "Address Verified". At the bottom, there are "Back" and "Continue" buttons, and a "Highlight missing information" toggle switch. The footer contains "Terms", "Privacy Policy", and "© 2024 Avalara, Inc."

> 1099 and W9 Compliance

Avalara 1099

Easy way online to e-file and manage 1099s, W-2s, 1095s, W-9s, and more



Payer	Total Forms	IRS Status	Recipient E-Delivery	Recipient Postal Mail	CSV	CPA
Cheddar Cheese Inc.	1099-Q: 1 H: 3	Sent: 1	Accepted: 1 Scheduled: 1	Mailed: 1 Scheduled: 1		Assign
Mass Transit Co.	MISC: 1	Sent: 1		Scheduled: 1		Assign
ND Fishery Inc.	MISC: 3 W-9: 2	Sent: 3		Scheduled: 1		Assign
Santa Claus Inc.	MISC: 2 DIV: 1 INT: 1	Sent: 4	Emailed: 2	Scheduled: 1		Assign
Snow Pilots	MISC: 1 W-2: 1 INT: 1 OID: 1					Assign
Sombrero Hats LLC	MISC: 1	Sent: 2		Mailed: 1		Assign



Paperless

Create and e-file 1099s and other information returns to the IRS. Provide secure e-delivery to your recipients and vendors.



Fewer fines and penalties

Verification processes and API's help avoid human error and keep sensitive information off company computers.



Transparent pricing

No extra fee for incremental e-filing at any time during the year.



I have used Avalara 1099 for the last few years and it has saved me so much time and money and has eliminated a great deal of year-end aggravation... It has truly improved my year end process and peace of mind."

Ayzha Wolf
Owner, AYZ Financial Services

The Avalara 1099 & W-9 Workflow

Begin collecting, managing, and e-filing immediately

Create a free account with Avalara 1099 & W-9 to get started.



Start collecting W-9s while validating TIN numbers in real time.



Manage W-9s in a secure repository where they are always accessible.



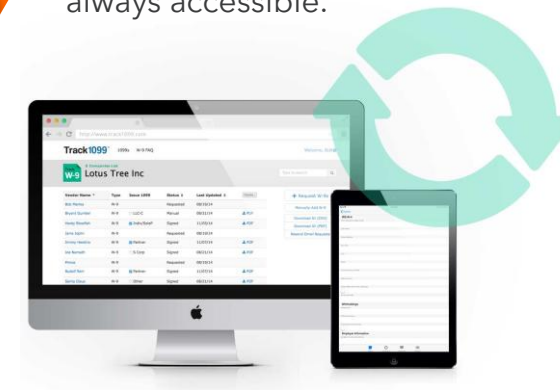
Create a 1099, e-file it to the IRS, e-file to required states and e-deliver to your vendor all at once.

Company Name
Industry
Choose...
First Name
Last Name
Email
Create Password
Who will use this account?
 Only me
 I lead a team
Phone
 I have read and accept the [terms](#) and [privacy](#) statements.
[Sign Up](#)
Already have an account? [Sign in](#)

Recipient	Form	Box 7
● Good ▲ OK for E-File ● Error Box Totals Report		
▲	MISC	\$0.00
▲	DIV	
●	MISC	\$3200.00

TIN Matching Service

MISC and DIV Skip TIN matching Do TIN matching



Payer	Forms	IRS Status	E-Delivery	Postal Mail	CSV
	1098-Q	Sent	Accepted	Scheduled	↓
H					
	MISC	Sent		Scheduled	↓
	W-2	Sent		Mailed	↓
INT					
DIV					

Designed for self-service

Nearly all users get started on their 1099 and W-9 compliance with no onboarding or go-live support with articles, videos, FAQs, and help all within the application.